



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Director's Office Executive Assistant

Job Code Title

Administrative Assistant VII

Pay Band

4b

Job Code Number

436114

Director's Office

Executive Office

Fair Labor Standards Act

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Director's Office supports the agency's Director and is composed of four work units: Legal Services Office; Office of Tax Policy and Research (TPR); Office of Human Resources and Organizational Development; and the Executive Office. The Executive Office includes the administrative support staff, fiscal administrator, public relations, and taxpayer assistance and public outreach.

Job Responsibilities

The Director's Office Executive Assistant coordinates office management and administrative support services for the Executive Office and supports the Tax Policy and Research Office. This includes developing and maintaining the TPR library, records management system, reports, spreadsheets, and other information and materials; maintaining executive reference files for the director; drafting individualized responses to information requests on behalf of the director and department managers; and providing a variety of other specialized support services as directed. The position reports to the Director's Office Management Officer and provides lead worker oversight to the other administrative support staff in the Executive Office. This position assumes management responsibilities when the management officer is out of the office.

• Program Coordination and Support 50%

1. Develops and maintains the TPR library and specialized records management system to provide effective access, storage, and maintenance of information. Assesses TPR-specific data maintenance needs. Maintains collections and data. Designs or configures database functions (tables, queries, formulas, etc.). Coordinates access, usage, and return procedures.
2. Develops and maintains specialized TPR reports and spreadsheets to ensure accuracy and completeness. Compiles, proofs, and reports data based on specific requests. Assists in the compilation, review, and production of major department reports such as the Biennial Report and other publications as directed.
3. Maintains executive reference files to ensure efficient and appropriate access, storage, maintenance, security, and confidentiality of information.
4. Drafts individualized responses to information requests on behalf of the director and other department managers to ensure efficient and appropriate responses to unique issues. This may involve researching and compiling relevant information and data; surveying appropriate program staff and managers; and coordinating review, revision, and dissemination.

5. Provides administrative support for the deputy director. Manages and coordinates their schedule to ensure effective allocation of time and resources to internal and external issues. Evaluates requests for consultation with the deputy director; determines relative significance and prioritizes requests. Recommends actions such as referral or delegation by the deputy director.
6. Leads the biennial preparation of records for the legislative session by coordinating and maintaining the department's permanent legislative records, electronic and hard copy bill files, preparing for hearings, gathering and providing information requested, and correspondence with legislators.
7. Between sessions this position compiles and assembles materials the department presents to legislators at oversight committees which include items such as computer presentations, display charts, and indexed handout books.
8. Designs, compiles, edits, and publishes the department's biweekly electronic newsletter. This includes responsibility for resolving technical issues as well as handling issues such as diverse subject matter, reader complaints, controversy, poorly written submissions, and ethical questions. The newsletter becomes a part of the department's permanent records.
9. Provides a variety of other specialized services in support of TPR programs and operations including research, data management, document design, and related services.

- **Office Management and Coordination 45%**

1. Writes, transcribes, and edits statistical and narrative reports, spreadsheets, and other technical documents to provide accurate, complete, and accessible references (administrative rules, legislative materials, etc.). This typically involves the application of specialized word processing and spreadsheet functions (tables, columns, graphs, formulas), formats, and production specifications. Coordinates document reviews, revisions, and signatures; reproduction; and dissemination as requested.
2. Assists in managing contracts for equipment, materials, and services to ensure conformance with bids, specifications, warranties, and related terms and conditions. Assists in the development of invitations/requests and selection criteria; coordinates review and selection; and monitors contract delivery. Tracks contract performance, expenditures, and outcomes to identify and resolve deficiencies.
3. Provides support to executive committees, advisory boards, task forces, and other decision-making bodies. Ensures availability of information, facilities, schedules, and other necessities. Responds to technical or procedural questions, researches and compiles requested information, develops reports and summaries, and provides a variety of other support services as directed.
4. Provides lead worker oversight to other administrative support staff within the office. Plans, assigns, and reviews work. Reviews and revises staff work plans for effective use of resources. Makes recommendations on performance appraisals and for corrective action. Participates in recruitment and selection.
5. Provides guidance, technical assistance, and training to other administrative support staff. Responds to unusually complex or contentious issues referred by other staff. Coordinates with other offices to promote consistency in office operations, identify resource-sharing opportunities, resolve common problems, and promote interoffice coordination and support throughout the department.
6. Coordinates and provides customer service to office staff, agency representatives, members of the public, and other visitors to ensure courteous and efficient responses to inquiries and requests for assistance. Researches and compiles general and specialized program information. Ensures consistent messaging on policies, procedures, and statutes. Drafts, proofs, and finalizes correspondence for signature by department managers as requested.
7. Coordinates the ongoing development and maintenance of electronic and manual records systems to ensure the accuracy, accessibility, and security of information by compiling and storing relevant data. This involves developing and establishing new database structures, queries, reports, as well as manual filing systems and procedures; maintaining data with current information; conducting and overseeing quality assurances; and responding to unusual or

complex records requests. Coordinates and oversees records retention and disposal procedures to ensure compliance with applicable requirements.

8. Coordinates office management and support programs, processes, and services to support ongoing executive and tax policy operations and program delivery. Develops and recommends operational plans and service models for communication, customer service, data and records management, inventory control, contract monitoring, procurement, and other functions.

- **Other Duties as Assigned 5%**

1. Performs other duties as assigned by supervisors. This includes updating web content and troubleshooting issues with web pages and links when regularly assigned staff is not available.

Job Requirements

To perform successfully as an administrative support specialist, the incumbents must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. It is essential that the incumbent has the ability to concentrate in the face of multiple distractions. Skills in multi-tasking; paying attention to details and accuracy; managing multiple priorities under tight deadlines; mathematics; providing timely and effective written, verbal, and interpersonal communication; identifying and resolving clerical errors; reviewing contracts, rules, and other technical documents for accuracy; interpreting and responding to specialized information requests; managing multiple projects under inflexible timelines; dealing with a wide range of personalities using discretion, active listening, critical thinking, and problem sensitivity; conflict resolution; compiling, analyzing, and reporting data from multiple sources; following written and oral directions and instructions; researching data to identify and resolve a wide variety of problems and issues; and word processing, spreadsheet, and database applications are required. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires knowledge of office management, business communications, records management, and customer service standards. Office management and coordination responsibilities also require knowledge of operational and program planning and quality assurance methods; contract solicitation and monitoring; and structures, functions, and protocols associated with formal boards and committees.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is one year of college or vocational training in business administration, office management, or related program and three years of job-related work experience.
 - Work experience should be made up of office management and/or administrative support services. Experience must include at least one year working with standard office software applications (word processing, spreadsheet, database, presentation).
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public,

other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.

- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. There are cyclical periods of high stress working under pressure of critical projects with hard deadlines. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use. Work hours may exceed 40 hours per week from time to time, especially during legislative sessions. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Dan Bucks, Director Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____ Date: _____

Name (print): _____